Client success is the work of aligning with the clients and supports them through the sales process. It’s the bridge between the company and the client and provides the client with value propositions. The 2 main objectives is to ensure stronger engagements and sales / profits but also build long term trust with the company. In the long run, my role would be to help the clients achieve their goals, thereby strengthening their relationship with the business. This, in turn, reduces the customer acquisition cost for the business.

**Helping clients realize value**

A CSM works on the prospects one-on-one. They act as the torchbearer for your business. They play a major role in convincing the client that your business is the key to their profits. Being an advocate for your company, they help build the brand reputation for your business. Having [essential communication skills](https://www.userlike.com/en/blog/customer-service-skills-traits) to nurture the brand’s image amongst the client’s options makes it a witty task. Thus, CSMs should have the knowledge of balancing their words in the exact amount and placing them in front of the client.

**Onboarding the client**

With a continuous focus on life cycle selling, businesses need not lose track of the ‘land and refresh’ mindset. [Onboarding](https://www.smartkarrot.com/resources/blog/saas-what-is-a-great-customer-onboarding-process/) new potential clients is one of the biggest responsibilities of the client success manager. It is always necessary to focus on the new client base so as to propel client acquisition thoroughly. Being excellent communicators, client success managers need to make the clients focus on what they need from the deal and how can they benefit, in the long run.

**Customer Retention**

We mentioned a gap between customer acquisition and customer retention processes earlier. The client success manager confronts this gap. It is their job to bring in loyal clients rather than one-time users for the company. They should stand as a trusted advisor for clients and help them identify growth opportunities. Knowledge enablement is one of the prime functions of a senior client success manager. Enabling the client with knowledge makes them believe in the company’s value propositions. Moreover, they need to follow up on the ones who do not respond in order to curb the churn rates.

Client success uses success metrics like ROI or Net Promoter Scores

Respond to client requests and issues

**Empathetic Engagement**

While increasing the client lifetime, it is essential to empathize and engage with them. In order to assure the client of their profit goals, the client success managers can use the company’s premium services or products as an engaging opportunity. **Client success platforms** notify the clients about the best opportunities. They can convince them as to how such services would be beneficial and would leverage the client’s accumulation. Due to their empathetic relationship, clients are likely to agree to their suggestions. They not only inform the client about the product or service but also tell them ways in which these can help them make strides in business.

The client success manager looks forward to the goals of the client primarily. For them, client goal achievement is the target.

**Drawing actionable insights from data**

Being a relationship builder does not reduce the technology burden on client success managers. They need to be comfortable with the company’s products and should be able to handle technology well enough. Today, most businesses are transitioning to [subscription-based economy](https://www.smartkarrot.com/resources/blog/the-world-of-xaas-anything-as-a-service-is-now-live/) and clients expect quality experiences. Hence, the knowledge of the client success manager plays a vital role. Though, this might need some prior training. But they should know how to convert the analytics insights driven from data into on-field client success management.

**Relationship management**

Building client relationships requires a lot of patience and passive effort. Client success management is not an easy job and things may turn out to be sour sometimes. Though its the manager’s skill that retains the clients irrespective of their first impression. Despite being a company’s advocate, an enterprise client success manager should organize and analyze the client’s information in such a way that the client cannot afford to turn the deal down. They should have real-time visibility into the client’s status in order to propose the right deals to them.

**1. UNDERSTANDS CUSTOMER NEEDS**  
A successful operations manager needs to have a deep acknowledgment of customer needs. That requires an understanding of what is a true measure of satisfaction to a customer. Maybe it is an immediate response to customer inquiries, a safe environment or fair price assurance. By knowing what makes your customers happy, you will be able to connect with them and provide guidance to your subordinates on how to take care of customers' needs.

**2. COMMUNICATES EFFECTIVELY**  
An effective operations manager knows how to communicate on many different levels with all types of people. The ability to get your message across to your staff, your superiors and, most importantly, your customers is an essential skill that will be put to the test each day. Using a wide array of communication vehicles, including verbal, written and body language techniques, will allow you to establish a rapport with each audience.

**3. UNDERSTANDS THE ORGANIZATION'S FINANCIAL PERFORMANCE**  
Operations managers are directly responsible for contributing to their organizations' financial performance. A successful operations manager knows how to prepare sales projections and expense budgets, and analyze profit & loss statements and balance sheets. To simplify the process of creating financial projections, an efficient operations manager should utilize business planning software, which allows one to build a comprehensive set of financial projections, reports and charts in less time.

**4. MOTIVATES THE TEAM**  
Organizations don't get much done unless their people are motivated. A successful operations manager knows the importance of building a strong team and developing positive relationships among team members. This can be achieved by understanding and addressing the individual needs and concerns of your staff.

**5. TRACKS AND MEASURES STAFF PERFORMANCE**  
It's essential to set work objectives for each of your team members and be able to measure their progress. As an operations manager, you need to establish specific measurements that tell your staff how they are doing against the goal. This will provide you with the clear base for employee recognition, but also for staff development. In addition, measuring and tracking individual personnel performance will provide feedback that helps focus on issues and success factors that will improve the overall organization's performance. An effective operations manager should look into utilizing human resource software, which streamlines the process of setting performance goals, evaluating employees and maintaining up-to-date training and certification information.

**6. CREATES A POSITIVE LEARNING ENVIRONMENT**  
Successful operations mangers understand the need to surround themselves with highly skilled and capable employees. You can accomplish this by providing specific, timely and respectful coaching and feedback to your crew to ensure operational excellence and to improve individual performance. As a role model to your staff you also need to be responsible for your own self-development.

**7. MAXIMIZES STAFF UTILIZATION**   
An operations manager is responsible for proper management of the organization's most critical asset—its people. As an operations manager, you need to ensure proper staffing for any given time. By establishing staffing threshold levels, you will be able to immediately assess staffing shortfalls and adjust. This will include directing your crew to other tasks to reduce bottlenecks or finding replacements in case of no-shows. Utilizing scheduling software will allow you to reduce time needed to perform the tedious task of staff scheduling. With the help of scheduling software, operations managers can schedule their personnel based on skills, seniority or desired workload, as well as track time off and view staff availability and number of hours scheduled. This will help ensure proper coverage and reduce overtime.

**8. DELEGATES**  
The difference between successful, happy operations managers and successful but unhappy operations managers can be found in the ability to get things done through others. As an operations manager, you need to learn how to hand over specific tasks to your team members. This should not be perceived by anyone on your team, including you, as putting additional burden on others, but a way to give you—the team leader—the time to concentrate on strategic projects that your entire team will ultimately benefit from.

**9. ENFORCES STANDARDS**   
As an operations supervisor, you need to ensure your staff adheres to all policies and practices established by your organization and government regulations. If your company does not provide clearly written policies to your employees, you are putting yourself and your staff at risk of legal ramifications and implications. Utilizing human resource software will allow your organization to quickly create employee handbooks, utilize office policy examples and various HR forms and checklists, as well as a library of IRS forms and U.S. Department of Labor posters. This should help protect not only your customers, but also you and your staff.

**10. INFUSES PRIDE IN ORGANIZATIONAL VALUES AND MISSION**  
Effective operations managers act with integrity, honesty and knowledge that promote the culture and mission of the company. You cannot expect your staff to adhere to company values or even operational polices if you do not demonstrate a full understanding of company strategy.